EBOOK

THE LAST-MINUTE CLIENT PLAYBOOK

HOW TO SAY YES, STAY SANE, AND
DELIVER HIGH-IMPACT RESULTS WITH
THE WORX CURRICULUM TOOLKIT

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Why This Playbook Exists

(AND WHY STRUCTURE WINS)

The Problem:

Last-minute families are not a fluke. They're a feature of the modern admissions cycle. But when a student (or panicked parent) shows up in October, it puts the IEC in a bind. Without a strong system, the workload feels too heavy, and the instinct is to say no.

The Opportunity:

This playbook gives you a way to say **yes**—without working overtime, compromising quality, or scrambling for resources. With the right structure in place, last-minute students can be served efficiently, effectively, and profitably.

This isn't just a plan. It's a system. And it's already built.

A PLAYBOOK FOR SERVING LAST-MINUTE CLIENTS USING THE WORX CURRICULUM TOOLKIT:

UNLOCK POTENTIAL	ACTIVATE PROCESS	CAPTURE PROFIT

What This Playbook Covers

- ✓ **The exact meeting structure**

- ✓ **What services to include (and what to trim)**

- ✓ **Modular product design options**

- ✓ **Time + revenue estimates**

- ✓ **How WORX makes it all possible**

WHAT IS THE WORX CURRIICULUM TOOLKIT?

Strategic simplicity isn't about doing less—it's about building smarter systems that allow you to do more of what you love: guiding students, not reinventing your backend.

Introducing the **WORX Curriculum Toolkit**—a structured, customizable system I developed after years of repeating the same work, refining my process, and realizing I needed a better way.

If you're ready to explore how this level of structure can support your practice, you can take a closer look here by scanning the QR or visiting the website.

Explore the WORX IEC Curriculum Toolkit: www.worxbynagla.com

THE EXACT PROCESS – 4 MEETING FRAMEWORK

This 4-meeting model is designed for fast onboarding, focused execution, and clear outcomes. Each stage is tied to specific modules inside the WORX Curriculum Toolkit.

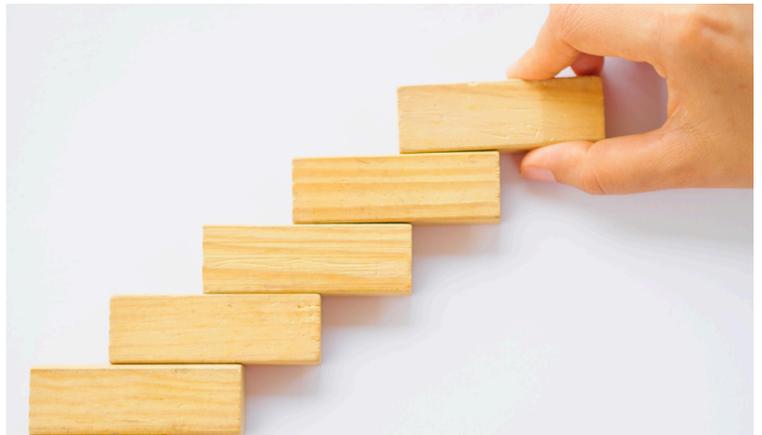| Meeting	Focus	Pre-Work (WORX Modules)	What Happens	Post-Work
1	Foundation + Timeline Strategy	Self-Inventory, Transcript Review, Initial College List (Module 2 and 5)	Confirm list scope, define package (UC-only, 3-app, etc.), assign research (Module 4)	Finalize list, start application portals (Module 5)
2	Application Strategy + Logistics	Update App Tracker, Begin LOR Requests (Module 5)	Define app types (ED/EA/UC/RA), identify key deadlines, and assign supplement work	Confirm recommenders, update progress
3	Essays + Content Development	Brainstorm Prompts or Your World Organizer (Module 7 & 8)	Select topics, outline Common App/UC PIQs, refer to Prompt, or assign internal writing plan	Submit draft(s), begin revisions
4	Review + Submission	App Review Checklist (Module 5)	Walk through portals, finalize apps, and confirm submission plan	Submit applications, complete thank-yous, and set up portals (Module

TIME BREAKDOWN:

- *Average for Experienced 4 - 6 hours Less experienced 6–10 hours total (IEC time)*

- *Student is supported by structured pre/post tasks*

- *Clarity = confidence = better decisions*

THE EXACT PROCESS – 4 MEETING FRAMEWORK

WITH DETAILED PRE-WORK & POST-WORK STEPS

Meeting 1: Foundation & Timeline Strategy

Goal: Establish client expectations, assess timeline feasibility, finalize a right-fit list, and launch the process quickly.

Pre-Work (Student):
- Complete WORX Self-Inventory (Module 2)
- Upload unofficial transcript and test scores (Module 2)
- Submit initial draft of college list (from any previous research or none at all)
- Fill out student profile and communication preferences
- Review Meeting Protocol Overview

During Meeting:
- Review list and discuss priorities (geography, size, selectivity, institutional type)
- Clarify short-term goals (UC only? ED/EA? Max number of apps?)
- Introduce App Tracker tool (Module 5)
- Assign College Research Task (Module 4)

Post-Work (Student):
- Complete College Research Task for final list schools
- Finalize college list in shared App Tracker
- Set up application portals (UC, Common App, Coalition, etc.)
- Begin drafting activities list (if not started)

THE EXACT PROCESS – 4 MEETING FRAMEWORK

WITH DETAILED PRE-WORK & POST-WORK STEPS

Meeting 2: Application Strategy & Logistics

Goal: Map out submission strategy, organize requirements, and ensure materials are in progress.

Pre-Work (Student):
- Update App Tracker with deadlines and application types (ED/EA/RA/UC)
- Begin requesting letters of recommendation
- Input recommenders into portals (if available)
- Begin completing Common App or UC activities section (Module 5)

During Meeting:
- Review application strategy + deadlines
- Confirm recommendation requests and testing requirements
- Discuss essay timeline and writing preferences
- Identify supplements required for each school
- Assign pre-writing task or refer to Prompt (Module 7 & 8)

Post-Work (Student):
- Upload LOR confirmation dates in tracker
- Identify and copy all required supplemental prompts
- Complete Your World Organizer (Module 8) or UC PIQ prewriting
- Confirm testing (SAT/ACT) or select "test-optional" where applicable

THE EXACT PROCESS – 4 MEETING FRAMEWORK

WITH DETAILED PRE-WORK & POST-WORK STEPS

Meeting 3: Essay & Content Development

Goal: Launch personal statement and supplements with strong alignment to the student's voice and timeline.

Pre-Work (Student):
- Complete Your World Organizer and Quick Writes (Modules 7 & 8)
- Share preferred essay idea or prompt
- Provide any previously written drafts (if applicable)

During Meeting:
- Review brainstorm and outline draft direction
- Assign essay development or refer to Prompt coach
- Clarify tone, narrative arc, and structure expectations
- Discuss how supplements align with core narrative

Post-Work (Student):
- Draft Common App essay or UC PIQs (Module 8)
- Submit for review/feedback
- Draft top-priority school supplements
- Review portal instructions for writing submissions

THE EXACT PROCESS – 4 MEETING FRAMEWORK

Meeting 4: Final Review & Submission

Goal: Complete quality control, confirm all requirements, and support confident submission.

Pre-Work (Student):
- Update App Tracker with submission status
- Upload finalized essays (Common App, UC, supplements)
- Complete Application Review Checklist (Module 5)

During Meeting:
- Conduct live walk-through of each application portal
- Check for completeness: LORs, test scores, essays, fees
- Finalize submission timing + plan for remaining apps
- Set expectations for post-submission steps

Post-Work (Student):
- Submit all ready applications
- Send thank-you emails to recommenders
- Save login credentials + submission confirmations
- Begin portal follow-up, interview prep (if applicable)

WHAT TO INCLUDE & WHAT TO TRIM

For Last-Minute Clients

Must-Include Elements:

- Application timeline & strategy (ED/EA/UC plan)
- Finalized or nearly-final school list
- Essay support (via Prompt or IEC)
- LOR management
- App tracker, portal setup, submission review

Remove or Defer:

- Major/career exploration
- Resume/activities enhancement
- Summer planning
- Long-term strategy (FAFSA, interviews = optional add-ons)

MODULAR PRODUCT OPTIONS

Service Option	Use Case	Scope
UC-Only Plan	November CA families	4 PIQs + Activities List
3-App Strategy	Common App + 2 targeted schools	Essay, recs, app tracker
Mini Comprehensive	3–5 apps, portal setup, LORs, review	Not full-cycle, but full-delivery

PRICING, PROFITABILITY & WHAT WORX DELIVERS

Sample Revenue Model
(Based on $500–$1200/hr rate)

Service Option	Time Estimate	Suggested Fee
UC-Only Plan	~6 hours	$3,000–$7,200
3-App Strategy	6–8 hours	$3,000–$9,600
Mini Comprehensive	8–10 hours	$4,000–$12,000

Why WORX?

WORX is the only platform-agnostic fully customizable white-labled modular advising curriculum that gives you:

- Plug-and-play client workflows

- Built-in student tasks & accountability

- Editable templates, trackers, and communication tools

- Flexibility to create short-term or full-service offerings

- A ready-to-deploy system that integrates into any IEC practice

Service Options You Can Offer Using WORX

WORX isn't just for last-minute clients - it's a complete advising system that supports scalable, high-value service packages for every kind of student.

The following are **customizable, real-world service models** built around the WORX Curriculum Toolkit. Each one includes student-facing tasks, a built-in advising structure, and aligned modules.

UC-ONLY FOCUS PLAN

Best For: California-based seniors applying exclusively to UCs in November

What's Included:

- College list confirmation + PIQ strategy
- Activities section development
- UC-specific timeline and portal guidance
- App checklist + submission planning

WORX Modules Used:

- Module 2: Onboarding
- Module 4: College Research
- Module 5: Application Tracker
- Module 7: Essay Brainstorming
- Module 8: UC PIQ Support

**TYPICAL TIMELINE:
3–4 WEEKS**

**FEE RANGE:
$3,000–$7,200**

3-APPLICATION COMPLETION PLAN

Best For: Students needing a focused but high-quality package (e.g., 1 ED, 2 RD schools)

What's Included:

- App strategy + deadline planning

- Essay brainstorming and writing support

- Activities list + LOR guidance

- Final app checklist + review

WORX Modules Used:

- Module 2: Onboarding

- Module 3: Application Strategy

- Module 5: App Requirements + Tracker

- Module 7: Brainstorming

- Module 8: Common App Essay

TYPICAL TIMELINE: 4-6 WEEKS

FEE RANGE: $3,000–$9,600

MINI COMPREHENSIVE PACKAGE

Best For: Families who want structure, guidance, and accountability—but not a full-cycle plan

What's Included:

- Full 4-meeting framework

- College list review

- App timeline + deadline strategy

- Essays + portal setup

- Submission readiness + post-app checklist

WORX Modules Used:

- Module 2: Onboarding

- Module 3: Application Strategy

- Module 4: College Research

- Module 5: Application Tracker

- Module 7: Essay Brainstorming

- Module 8: UC PIQ Support

TYPICAL TIMELINE: 6-8 WEEKS

FEE RANGE: $4,000–$12,000

Service Options You Can Offer Using WORX

HOURLY À LA CARTE SERVICES

Best For: Returning clients, transfer students, or families on a tight budget

What's Included:

- Any stand-alone task (college list review, essay brainstorming, app walk-through, etc.)

- Flat hourly rate or 3-hour mini-bundle

WORX Modules Used:

- Pick-and-choose based on need. You still have structure, even for one-off sessions.

FEE RANGE:

$500–$1,200/HOUR
OR
$1,500–$3,600
PER BUNDLE

PRO TIP:

Each of these services is fully supported by WORX.

The materials are already created. The structure is already built. Your job is simply to guide and adapt.

Let WORX do the heavy lifting, so you can focus on delivering value, not recreating documents or chasing deadlines.

Stop Reinventing Your Pprocess

The WORX IEC Curriculum Toolkit gives you:

✓ Phase-based modules
✓ Pre-named student-facing tasks
✓ Editable white-label templates and guides
✓ Aligned backend and frontend structures

WORX doesn't just help you manage last-minute clients—it gives you a system to serve all students with confidence and clarity.

SCAN BELOW FOR MORE RESOURCES:

EXPLORE THE TOOLKIT

www.worxbynagla.com

PREVIEW THE MODULES

www.worxbynagla.com/worx-recordings-resources

SCHEDULE A PERSONAL WALKTHROUGH

www.worxbynagla.com/worx-contact

If you have questions about what you've learned, reach out: nagla@worxbynagla.com